

# Level 3 Customer Service Specialist

EPA-Kit

## Assessing the Practical Observation with Q&As

- Practical observation with Q&As guidance
- Practical observation – mock assessment guidance
- Practical observation with Q&As brief and criteria

## The practical observation with Q&As – guidance

### Practical observation

The end-point assessment plan states that the practical observation is to be covered in 1 session, lasting **60-minutes** with a +/- 10% tolerance either way. The observation will be pre-planned giving the apprentice a **minimum of 2 weeks' notice** of the date it is set to take place.

While on-programme, the employer/training provider should discuss the areas that could be assessed as part of the practical observation with the apprentice.

Highfield recommends that the apprentice completes at least 1 mock assessment of both the practical observation and the questioning.

The employer/training provider should encourage and guide the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the criteria.

The observation needs to take place in the apprentice's normal place of work.

During the practical observation the apprentice should have the opportunity, if required, to move from 1 area/function of the business to another, allowing the best possible chance for situations to occur naturally and to enable the apprentice to demonstrate how they have applied their KSBs.

The apprentice should be prepared to **provide clarification** to the end-point assessor in the observation as to their actions and the rationale behind them.

The independent assessor will plan the practical observation in agreement with the apprentice and their employer, taking account of any workplace considerations. These considerations would typically include:

- timings
- ensuring the correct environment
- ensuring there is sufficient space to allow the apprentice to work

### Q&As

The end-point assessor will question the apprentice to clarify their knowledge and understanding is being applied correctly throughout the observation.

The end-point assessors can ask supplementary questions as required to seek further clarification. The amount of questioning time carried out during the observation should not exceed **9 minutes**.

The independent assessor must plan the practical observation in conjunction with the apprentice and their employer, taking into account workplace considerations. This would typically include timing, the right environment and enough space for the apprentice to do their job.

The practical observation must:

- reflect typical working conditions
- allow the apprentice to demonstrate all aspects of the standard being assessed
- take a synoptic approach to the assessment of the overall competence
- be carried out on a one-to-one basis

**Practical observation with Q&A grading**

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages. Apprentices need to meet **all pass criteria** to be awarded a pass, and all pass and **all distinction** criteria to be awarded a distinction.

## Practical observation with Q&As – mock assessment

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice completes a mock practical observation and experiences the mock questioning in preparation for the real thing.

The most appropriate form of mock assessment will depend on the resources available to the employer/training provider.

In designing a mock assessment, the employer/training provider should consider the following elements in its planning.

- The mock observation should take place in a real workplace, or a realistic simulation if the real workplace does not present all the required assessment opportunities.
- The employer/training provider can have other personnel to play the parts of customers and team members to make the mock more realistic.
- It is recommended that the mock observation has been practised with all personnel involved before taking place so that everyone is briefed and aware of their roles. The mock should provide the opportunity for the apprentice to demonstrate both the 'pass' level and the 'distinction' level criteria.
- A **60-minute** time slot should be available for the complete practical observation, if it is intended to be a complete mock observation covering all relevant standards. This time can be split up to allow for progressive learning with the apprentice.
- Video recording of the mock assessment and/or allowing it to be observed by other apprentices. This may be necessary for employers/training providers if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- The apprentice's performance should be assessed by a competent trainer/assessor.
- Feedback should be shared with the apprentice to complete the learning experience. The mock assessment sheets later in this guide may be used for this purpose.

## The practical observation with Q&As - criteria

The following pages include the criteria that are covered in the practical observation.

<b>Assessment Criteria</b>	<b>Distinction Criteria</b>
<p><b>Knowing your customers and their needs/Customer Insight</b></p> <p>K3.3 Demonstrate how they analyse, use and present a range of information in order to provide customer insight.</p> <p>K3.4 An ability to assess at least 3 different customer types and their role of emotions in order to achieve a successful outcome for them.</p> <p>K3.5 Evidences knowledge of how customer expectations can differ between cultures, ages and social profiles.</p>	<p><i>There are no distinction criteria for this component</i></p>
<p><b>Customer Service culture and environment awareness</b></p> <p>K4.2 Demonstrates an understanding of current legislation, compliance and regulatory guidance and their impact on customer service delivery.</p>	<p><i>There are no distinction criteria for this component</i></p>
<p><b>Business focussed service delivery</b></p> <p>S1.1 Demonstrates resolution of a range of complex customer service issues, explaining the approach used and why, demonstrating accountability throughout.</p> <p>S1.2 An ability to assess situations and offer clear explanations, options and solutions that balance customer and organisational requirements</p>	<p>S1.3 <i>Demonstrates own communication with customers that ensures the best solution to meet customer requirements and organisational needs.</i></p>
<p><b>Providing a positive customer experience</b></p> <p>S2.3 Demonstrates through advanced questioning, listening and summarising, the negotiation of mutually beneficial outcomes.</p>	<p>S2.8 <i>Demonstrates when they provided additional solutions to customers and made recommendations based on their findings to enable improvement.</i></p>

<p>S2.4 Demonstrates management of challenging and complicated situations, balancing organisational needs and customer satisfaction.</p> <p>S2.5 Demonstrates identifying, negotiating and agreeing appropriate options with customers, making realistic commitments and delivering on them in line with organisational procedures.</p> <p>S2.6 Recognises when customer emotions have been affected by the level of service offered.</p> <p>S2.7 Demonstrates how they adapt their communication style to clearly and concisely communicate complex information to customers to support positive outcomes.</p>	
<p><b>Customer service performance</b></p> <p>S4.1 Evidence when they have maintained a positive relationship even when they are unable to deliver the customers expected outcome.</p> <p>S4.2 Demonstrates when and how historical interactions, challenges and related information are taken into account in determining the next steps, when managing referrals and escalations.</p>	<p><i>There are no distinction criteria for this component</i></p>
<p><b>Ownership/Responsibility</b></p> <p>B2.2 Evidences how they recognise when customer expectations are not met and demonstrates how, using appropriate communication techniques, this could be managed to maintain a positive relationship.</p> <p>B2.3 Shows proactivity and creativity when identifying solutions to customer and organisational issues.</p>	<p><i>There are no distinction criteria for this component</i></p>

<p><b>Team Working</b></p> <p>B3.2 Demonstrates achievement of results through effective teamwork and collaboration with colleagues at all levels.</p> <p>B3.3 Shows adaptability of own skills when working with internal customers.</p>	<p><i>There are no distinction criteria for this component</i></p>
<p><b>Equality</b></p> <p>B4.1 Ability to react appropriately to customer emotions and bring about a successful outcome for different customer types.</p> <p>B4.2 Demonstrates adaptability and flexibility in working towards meeting customer needs, supporting equality, diversity and inclusion in their customer service delivery.</p>	<p><i>There are no distinction criteria for this component</i></p>
<p><b>Presentation</b></p> <p>B5.1 Demonstrate brand advocacy, values and belief when dealing with customer requests to build trust, credibility and satisfaction.</p> <p>B5.2 Evidence to show how their personal presentation made a positive impact on their organisation's brand.</p>	<p><i>There are no distinction criteria for this component</i></p>